

# **SiteManager** **Training Manual**



Module A  
Chapter 1

**Contract Administration**  
**Contract Records**

Section A-2-10-1

## **Entering Checklist Event Date Information**

Student's Version

Indiana Department of Transportation  
October 2007, Version 3.7b

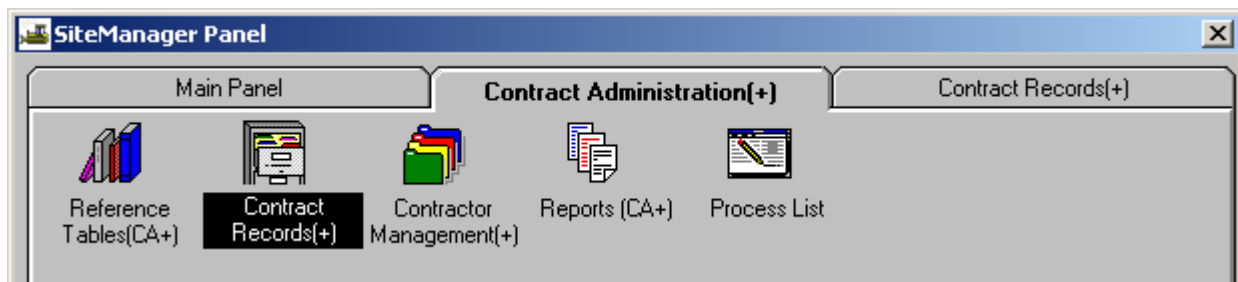
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# Entering Checklist Event Date Information

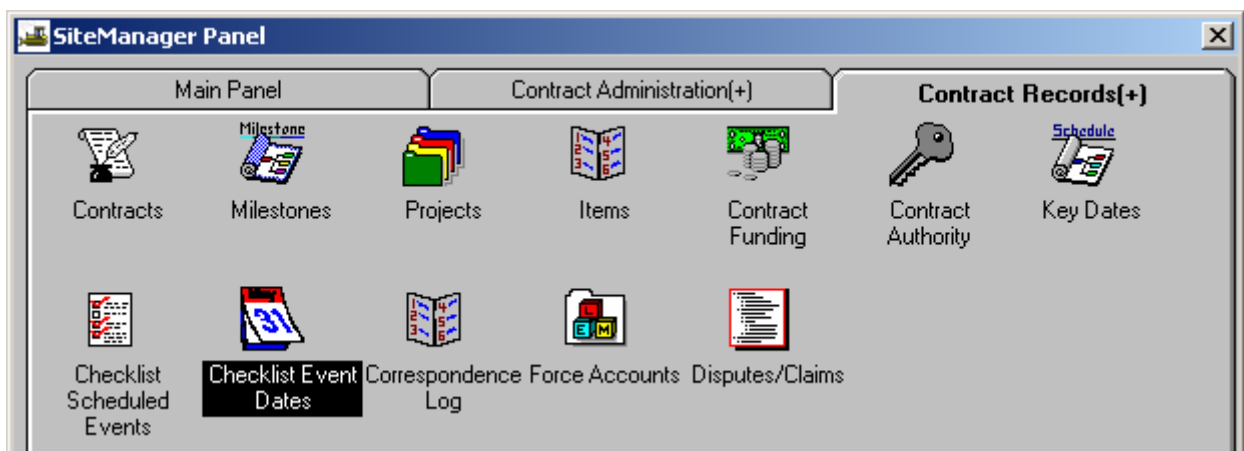
This document will explain how to enter Actual Dates into a Checklist Event.



“Double-click” on **Contract Administration (+)** located on the Main Panel.



“Double-click” on **Contract Records (+)**.



“Double-click” on **Checklist Event Dates**.

**Select Contract**

**Selection**

Contract ID: R -90006

Find:

**Contract ID**

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location Description 1
R -90001	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R -90002	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R -90003	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R -90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R -90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT OA
R -90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OA

OK Cancel

The Select Contract window opens.

The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr:** is the unique identifier for the project.
- **Status:** column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County:** column shows the county where the majority of the work is located.
- **Lvl 2:** The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Find, Filter or Sort functions to locate the appropriate Contract.

“Double-click” on the appropriate **Contract ID**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Checklist Event Dates** New

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc to Activate	Required Ind	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only ----		00/00/00	1	N	N		N
As-Built Plans	One Time Only ----		00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only ----		00/00/00	1	N	N		N
CR-2	One Time Only ----		00/00/00	1	N	Y		N
Cross-Sections	One Time Only ----		00/00/00	1	N	N		N
DBE Utilization	One Time Only ----		00/00/00	1	N	Y		N
<b>M-39</b>	<b>One Time Only ----</b>		<b>10/20/06</b>	<b>1</b>	<b>N</b>	<b>N</b>	<b>Other</b>	<b>N</b>

Projected Date Actual Date Comments

“Click” on the appropriate **Event Type** located in the top panel.

“Click” on the **New**  button.

**AASHTO SiteManager**  
File Edit Services Window Help

**Checklist Event Dates** Save

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc to Activate	Required Ind	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only ----		00/00/00	1	N	N		N
As-Built Plans	One Time Only ----		00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only ----		00/00/00	1	N	N		N
CR-2	One Time Only ----		00/00/00	1	N	Y		N
Cross-Sections	One Time Only ----		00/00/00	1	N	N		N
DBE Utilization	One Time Only ----		00/00/00	1	N	Y		N
<b>M-39</b>	<b>One Time Only ----</b>		<b>10/20/06</b>	<b>1</b>	<b>N</b>	<b>N</b>	<b>Other</b>	<b>N</b>

Projected Date Actual Date Comments

10/20/06 10/19/06 Enter comments about the event

Click in the Bottom Panel.

**Projected Date:** **Projected Date** is the date the event was projected to occur. The Projected Date is set up in the Checklist Scheduled Events window.

**Actual Date:** **Actual Date** is the date the Checklist Event occurs.

“Click” in the **Actual Date** field. This date is associated with the date of the highlighted **Event Type** located in the top panel.

“Enter” the date of the event in mm/dd/yy format.

**AASHTO SiteManager**  
File Edit Services Window Help

**Checklist Event Dates** Save

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only -----		00/00/00	1	N	N		N
As-Built Plans	One Time Only -----		00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only -----		00/00/00	1	N	N		N
CR-2	One Time Only -----		00/00/00	1	N	Y		N
Cross-Sections	One Time Only -----		00/00/00	1	N	N		N
DBE Utilization	One Time Only -----		00/00/00	1	N	Y		N
M-39	One Time Only -----		10/20/06	1	N	N	Other	N

Projected Date	Actual Date	Comments
10/20/06	10/19/06	Enter comments about the event

“Click” in the **Comments** field located in the bottom panel.

“Enter” any comments associated to the event. 60 character/spaces are allowed in this field.

“Click” the **Save**  button.

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File Edit Services Window Help

**Checklist Event** New

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only -----		00/00/00	1	N	N		N
As-Built Plans	One Time Only -----		00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only -----		00/00/00	1	N	N		N
CR-2	One Time Only -----		00/00/00	1	N	Y		N
Cross-Sections	One Time Only -----		00/00/00	1	N	N		N
DBE Utilization	One Time Only -----		00/00/00	1	N	Y		N
M-39	One Time Only -----		10/20/06		N	N	Other	N

Projected Date	Actual Date	Comments
10/20/06	10/19/06	Enter comments about the event

If the event occurs more than one time, repeat the process to enter additional dates.

**AASHTO SiteManager**


File Edit Services Window Help

**Checklist Event Dates** Delete

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only	----	00/00/00	1	N	N		N
As-Built Plans	One Time Only	----	00/00/00	1	N	N		N
Asbestos Exclusion Lette	One Time Only	----	00/00/00	1	N	N		N
CR-2	One Time Only	----	00/00/00	1	N	Y		N
Cross-Sections	One Time Only	----	00/00/00	1	N	N		N
DBE Utilization	One Time Only	----	00/00/00	1	N	Y		N
M-39	One Time Only	----	10/20/06		N	N	Other	N

Projected Date	Actual Date	Comments
10/20/06	10/19/06	Enter comments about the event.
10/20/06	00/00/00	

An entry in the bottom panel can be deleted by “clicking” the entry and “clicking” the **Delete**  button located on the toolbar

**AASHTO SiteManager**

Do you wish to delete this Contract Checklist Event Date?

Yes No

“Click” the Yes button if the date entry is to be deleted.

**AASHTO SiteManager**

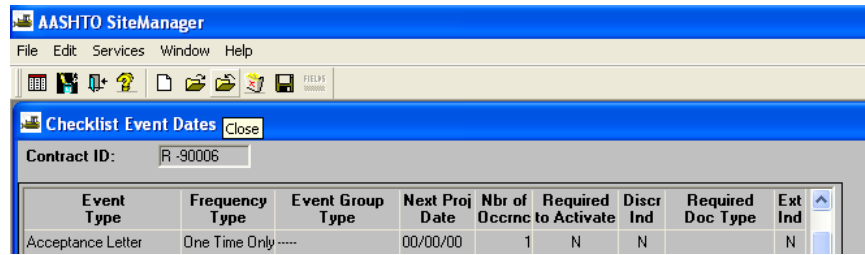
File Edit Services Window Help

**Checklist Event Dates** Save

Contract ID: R-90006

Event Type	Frequency Type	Event Group Type	Next Proj Date	Nbr of Occrnc	Required to Activate	Discr Ind	Required Doc Type	Ext Ind
Acceptance Letter	One Time Only	----	00/00/00	1	N	N		N

“Click” the **Save**  button located on the toolbar.



“Click” on the **Close**  button located on the toolbar.



## A-2-10-1 Group Exercise

The material certification letter was received from the contractor and reviewed on November 2, 2006 for contract R -90006. Update SiteManager to reflect the information.

Double-click on Contract Administration

Double-click on Contract Records

Double-click on Checklist Event Dates

Double-click on Contract R -20006

Select Checklist Event    Material Certification

Click the New

Enter                      Actual Date              11/02/06.

Save

Close